



Tourism Indicators and Trends



Salt Lake Convention and Visitors Bureau Conference

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Utah Travel Council



Tourism Defined

Activities of persons traveling and staying in places outside their usual environment for not more than one consecutive year for leisure, business, and other purposes. Travel and tourism combines segments from other industries that provide goods and services demanded while traveling away from home.



Transportation



**Eating &
Drinking**



**Hotels &
Lodging**



Car Rentals



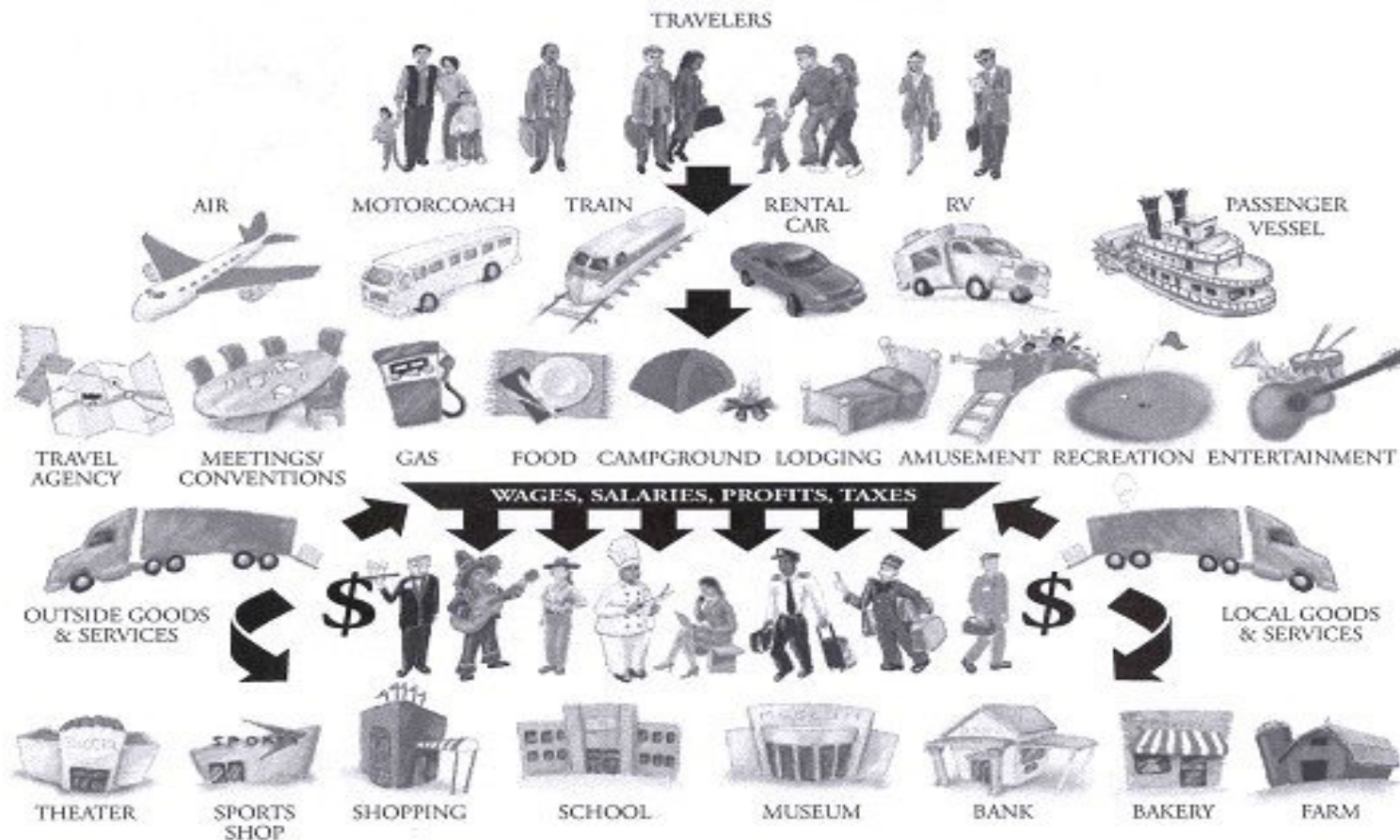
**Amusement &
Recreation**



Effects of tourism also felt in manufacturing, construction, real estate, government, public utilities, agriculture and other services.



HOW TOURISM DOLLARS ARE SPENT...





Economic Impact of Travel in the U.S., 2003p

(Including both U.S. resident and international travel)

- **Travel Expenditures: \$554.5 Billion**
 - **Domestic: \$490.0 Billion**
 - **International: \$64.5 Billion**
- **Travel-Generated Payroll: \$158.4 Billion**
- **Travel-Generated Employment: 7.2 Million Jobs**
- **Travel-Generated Tax Revenue: \$94.7 Billion**



Source: Travel Industry Association of America, Bureau of
Economic Analysis/U.S. Department of Commerce

P=preliminary



National Indicators

Air Traffic year-to-date through August 2004:

- **Domestic Air Revenue Passenger Miles increased 8.2%**
- **International Air Revenue Passenger Miles increased 18.1%**
- **Passenger Enplanements (Domestic) increased 4.6%**
- **Employment decreased 4.1%**

Source: Air Transport Association, Bureau of Labor Statistics.
Employment excludes scenic and sightseeing air transportation and air courier services






National Indicators

Rail Traffic year-to-date through August 2004:

- **Amtrak Revenue Passenger Miles decreased 2.5%**



Source: Amtrak

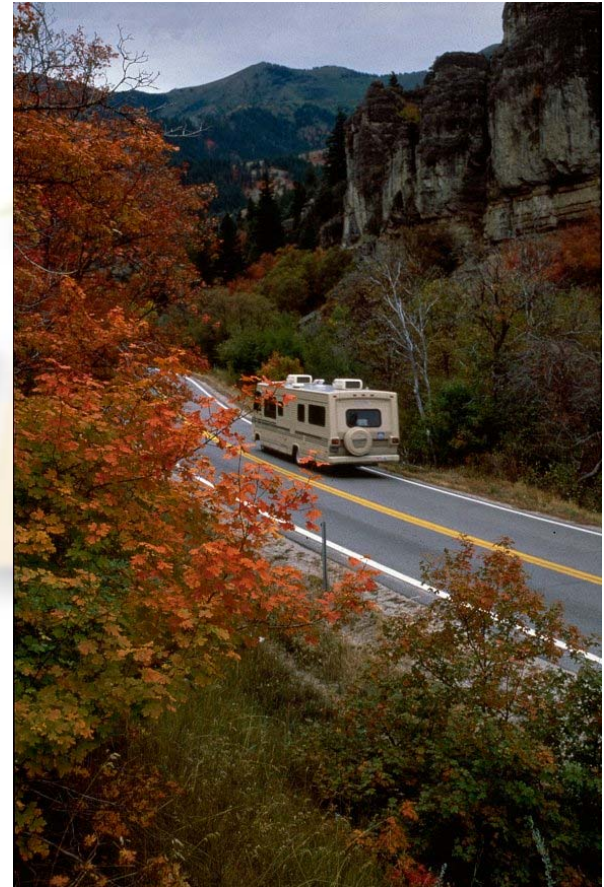




National Indicators

**Auto Travel year-to-date
through August 2004:**

- **Gasoline Service Station Receipts increased 13.6%**
- **Demand increased 1.7%**



Source: U.S. Bureau of Census, Department of Energy, Federal Highway Administration



National Indicators

**Hotel/Motel year-to-date
through August 2004:**

- **Demand for commercial lodging increased 4.3%**
- **Occupancy rate increased 3.3%**
- **Hotel Motel Receipts increased 8.3%**
- **Employment decreased 0.8%**





National Indicators

Restaurants year-to-date through August 2004:

- **Eating & Drinking Place Receipts increased 9.6.%**
- **Employment increased 2.5%**





Travel Forecast for U.S., 2004f

- **Travel Expenditures: \$587.8 Billion
(increase of 6.0%)**
 - **Domestic: \$518.4 Billion
(increase of 5.8%)**
 - **International: \$69.4 Billion
(increase of 7.6%)**





Travel Forecast for U.S., 2004

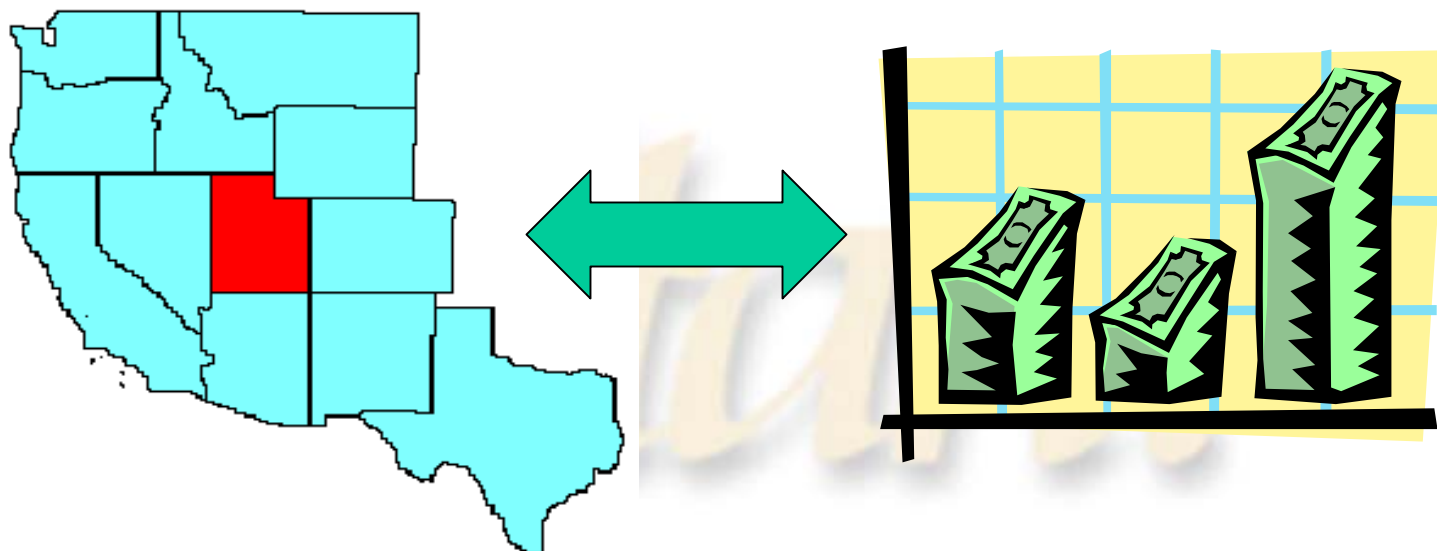
- **Total Domestic Person Trips (Millions)**
 - **1,180.7 (increase of 3.6%)**
- **Total International Visitors (Millions)**
 - **42.5 (increase of 5.3%)**





Economics of Tourism

Tourism's Foundation



Tourism is influenced by the condition of the statewide economy and the regional economy





Tourism is Big Business

- **\$4.38 billion in traveler spending to the Utah economy**
- **\$347 million in state and local tax revenues**
(\$420 per Utah household)
 - **\$255 million in state tax revenues**
 - **\$92 million in local tax revenues**
- **97,824 jobs in travel and tourism-related industries**
(9.1% of total statewide non-farm jobs)
- **16.9 million non-resident travelers to the State**
 - **16,310,000 domestic**
 - **590,000 international**





Primary Tourism Sectors

<u>Sector</u>	<u>% Change (2002-2003)</u>
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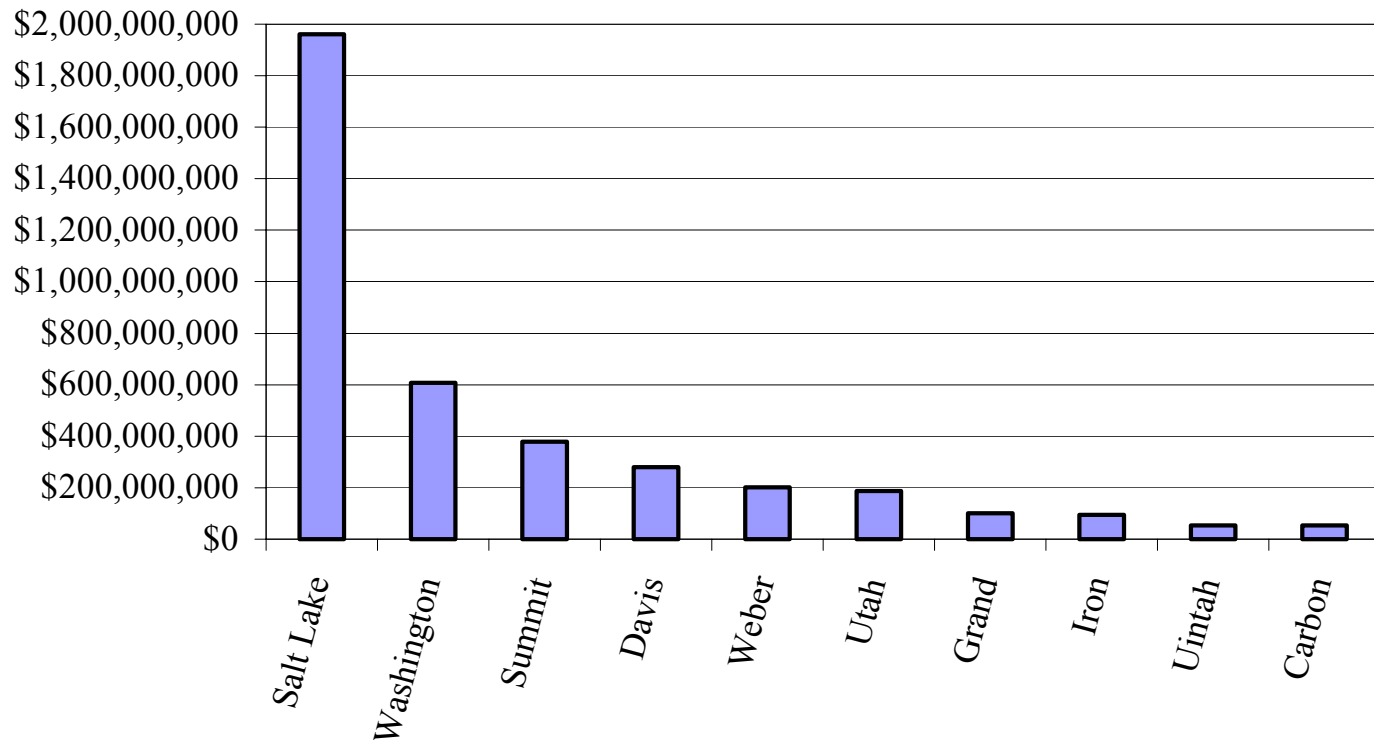
Transportation	-6.9%
Eating & Drinking	+2.7%
Amusement/Recreation	-0.3%
Hotel/Lodging	-11.0%
Auto Rental	-2.5%

TOTAL CHANGE	-1.0%
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2003 Total Traveler and Tourist Spending – Top 10 Counties

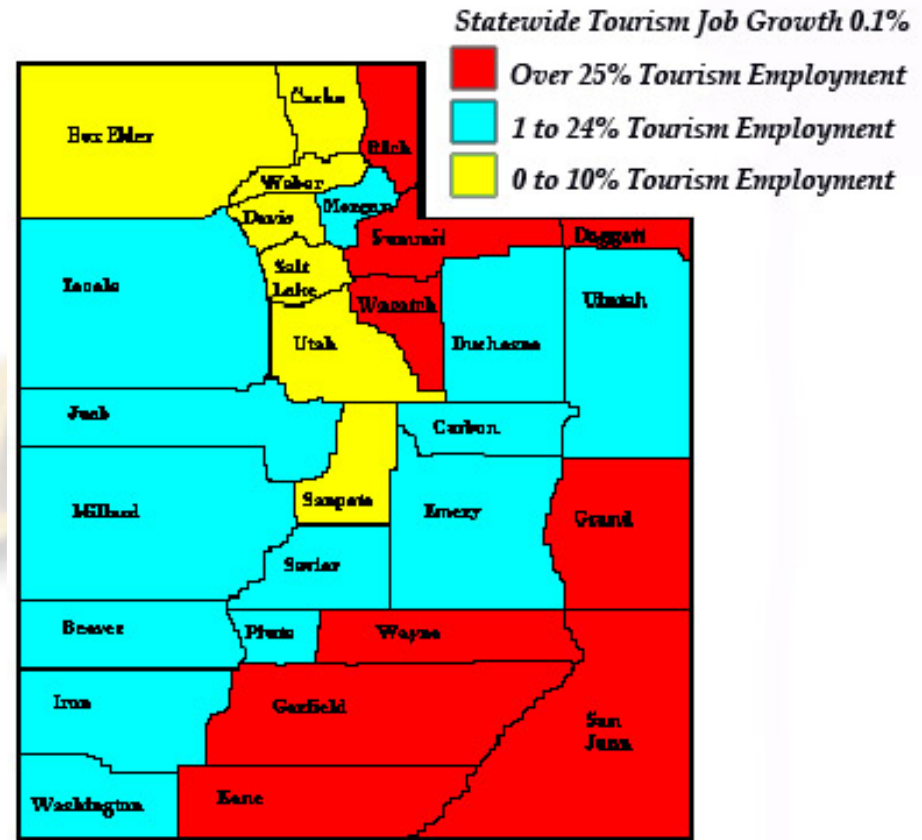




Many Counties Dependent on Tourism



- **9 Counties – Tourism is more than 25% of total employment**
- **22 Counties – Tourism is more than 10% of total employment**
- **Rural Counties are more dependent on tourism-related employment than counties along the Wasatch Front**

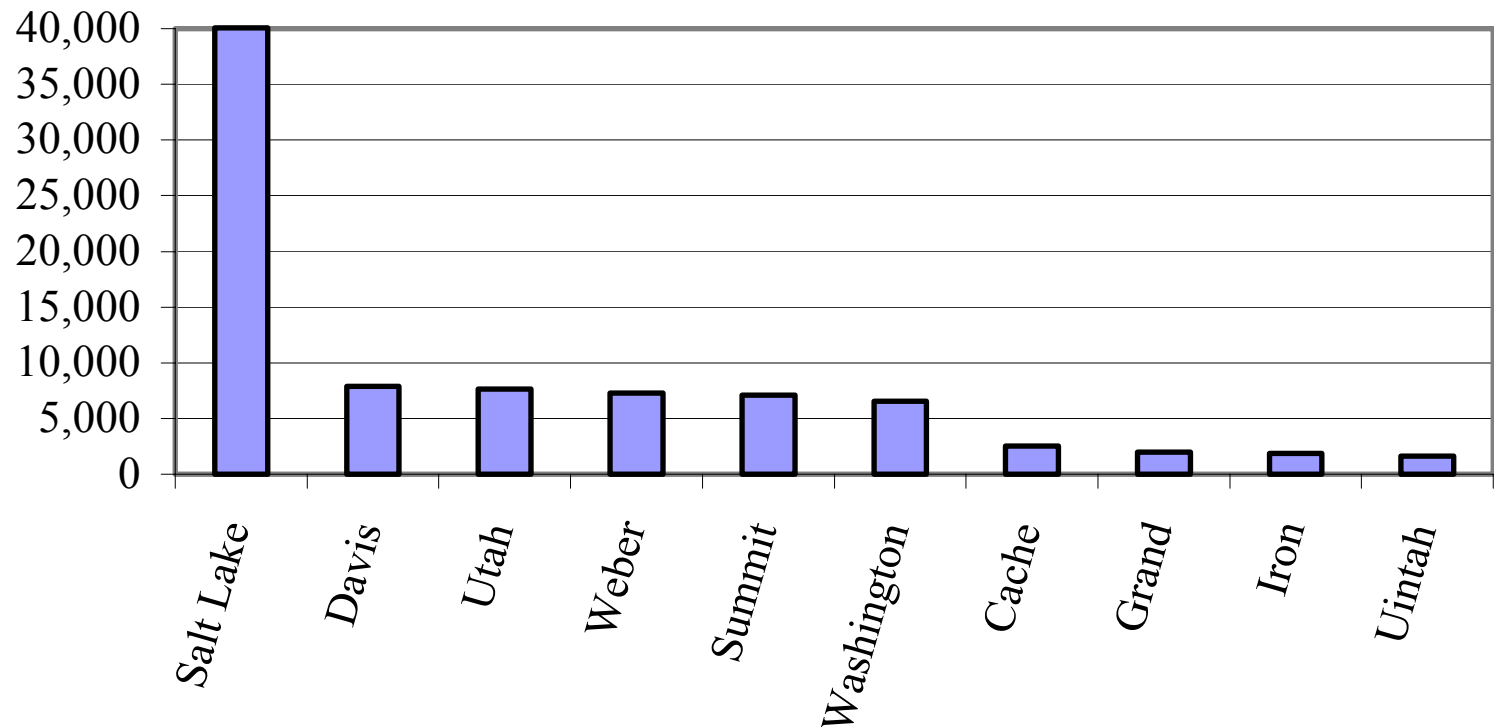


Source: Utah Dept. of Workforce Services, adapted by Utah Division of Travel Development





2003 Tourism and Travel-Related Employment





Tourism Taxes Locally Distributed

100% Back to Utah Communities


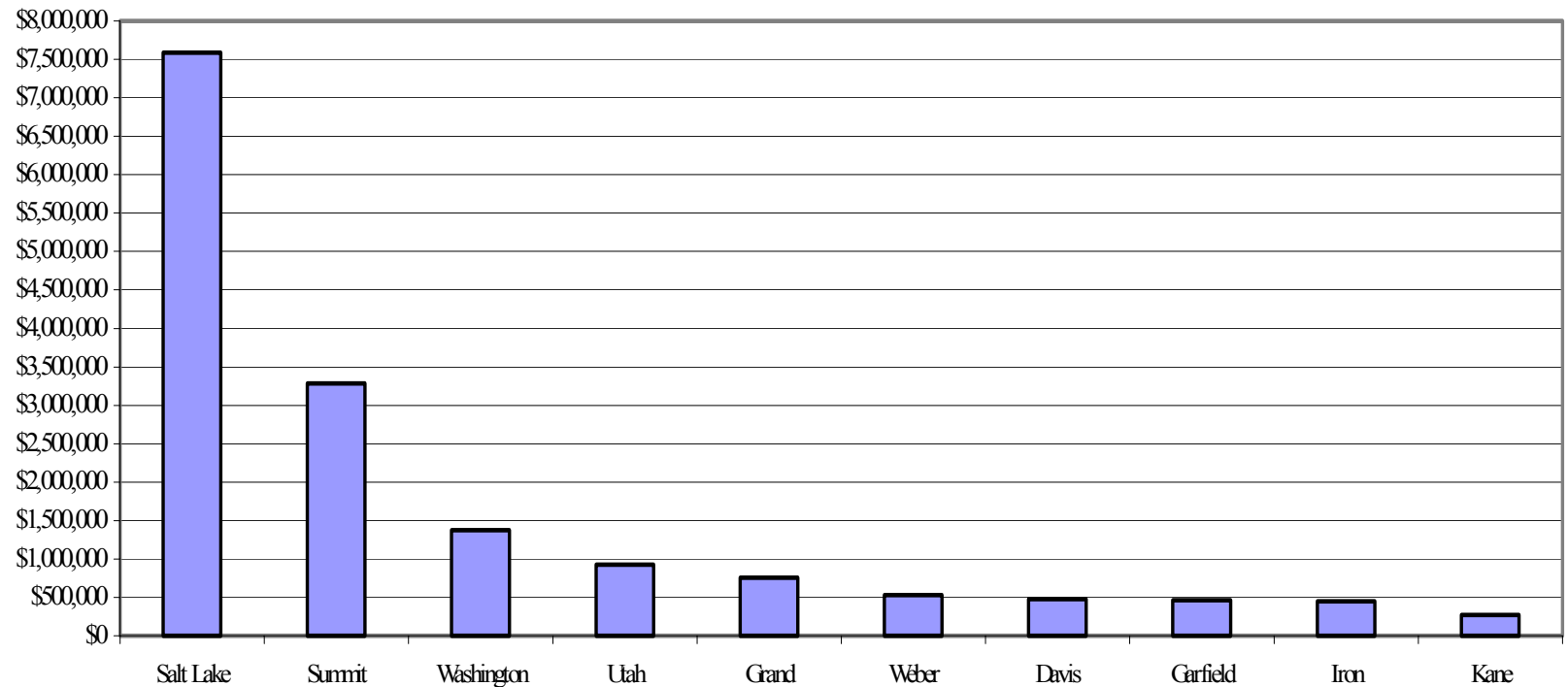
	<u>2003 Totals</u>	<u>% change 2002-2003</u>
Transient Room Tax	\$18,106,956	-9.5%
Restaurant Tax	\$23,527,620	-0.5%
Car Rental Tax	\$8,615,858	-4.7%
TOTAL	\$50,250,434	-4.6%

❖ In addition, local communities receive a portion of all sales tax revenues generated from travel and tourism related spending.





2003 Transient Room Tax – Top 10 Counties

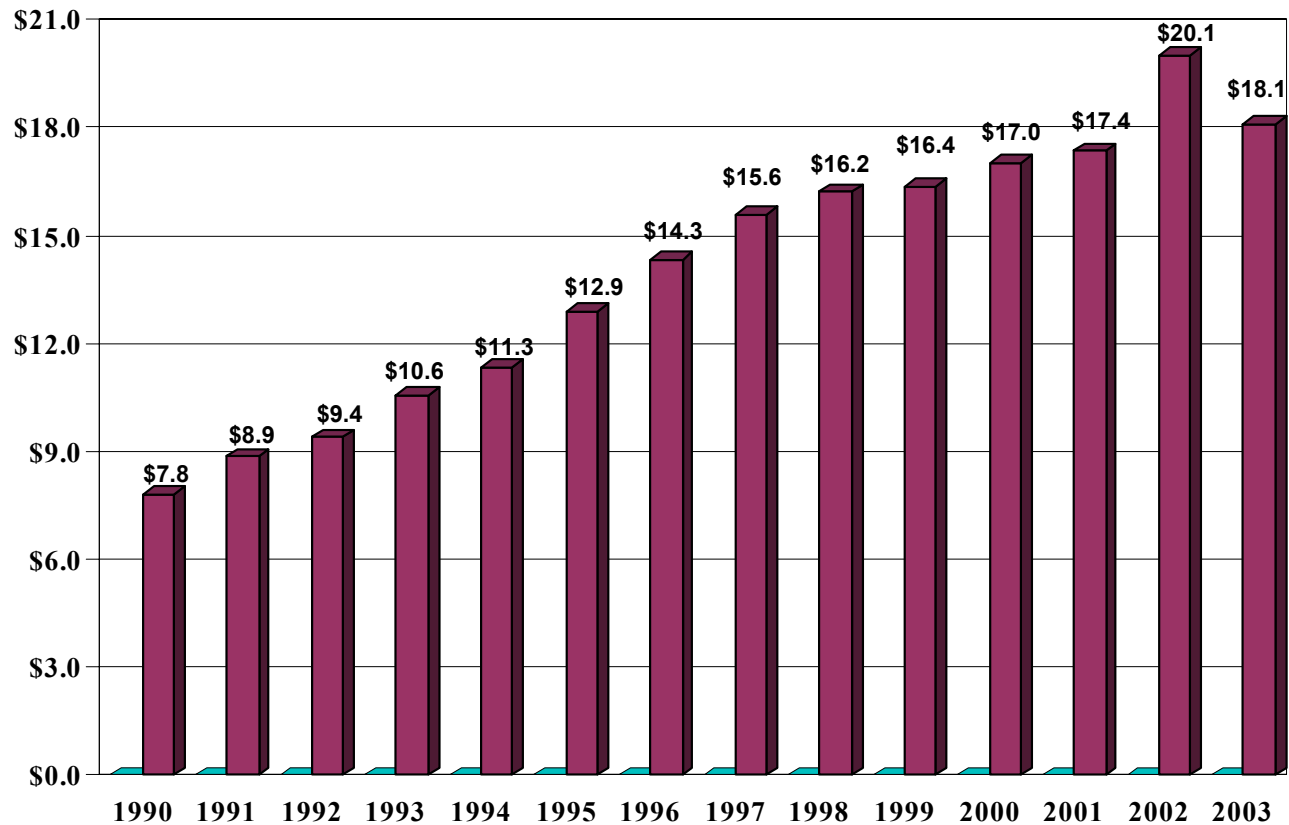


Source: Utah State Tax Commission



Gross Transient Room Tax Collections in Utah

Millions

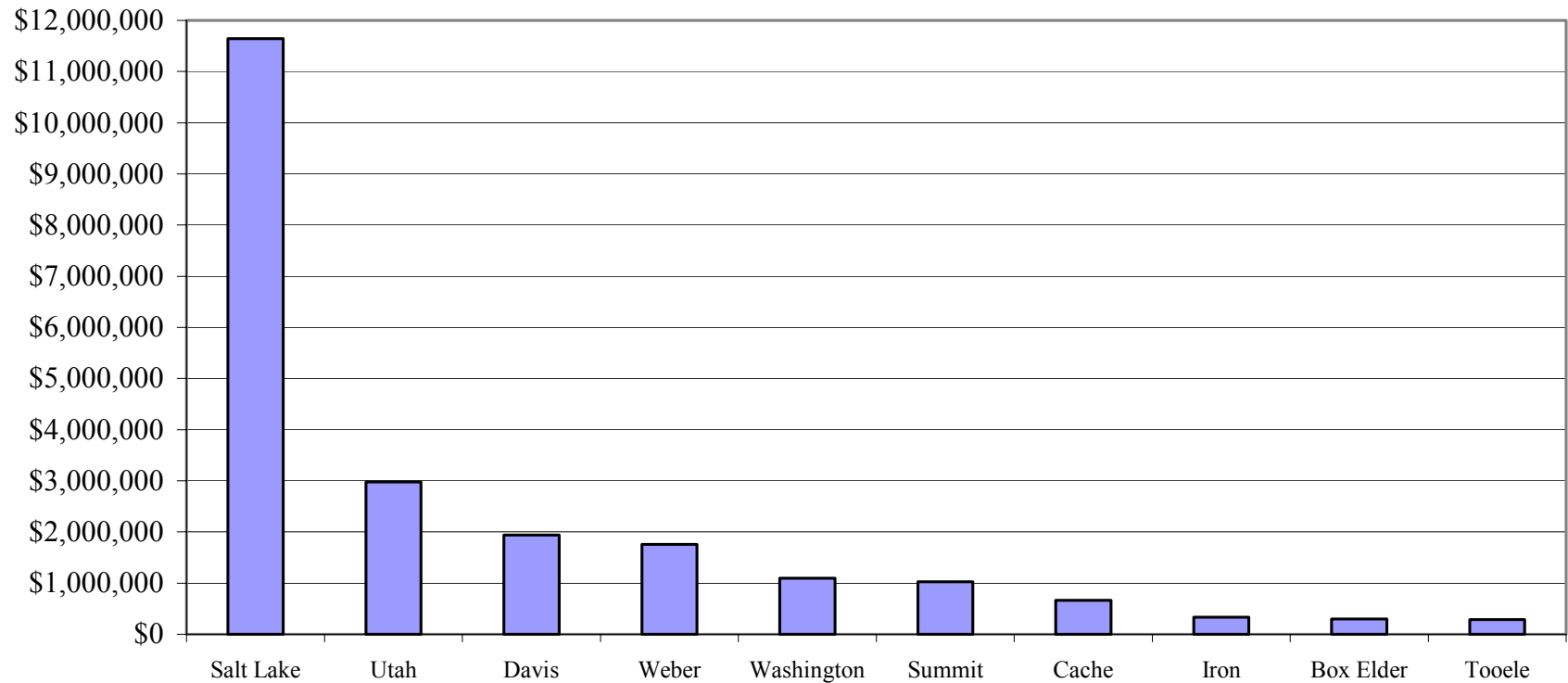


Source: Utah State Tax Commission





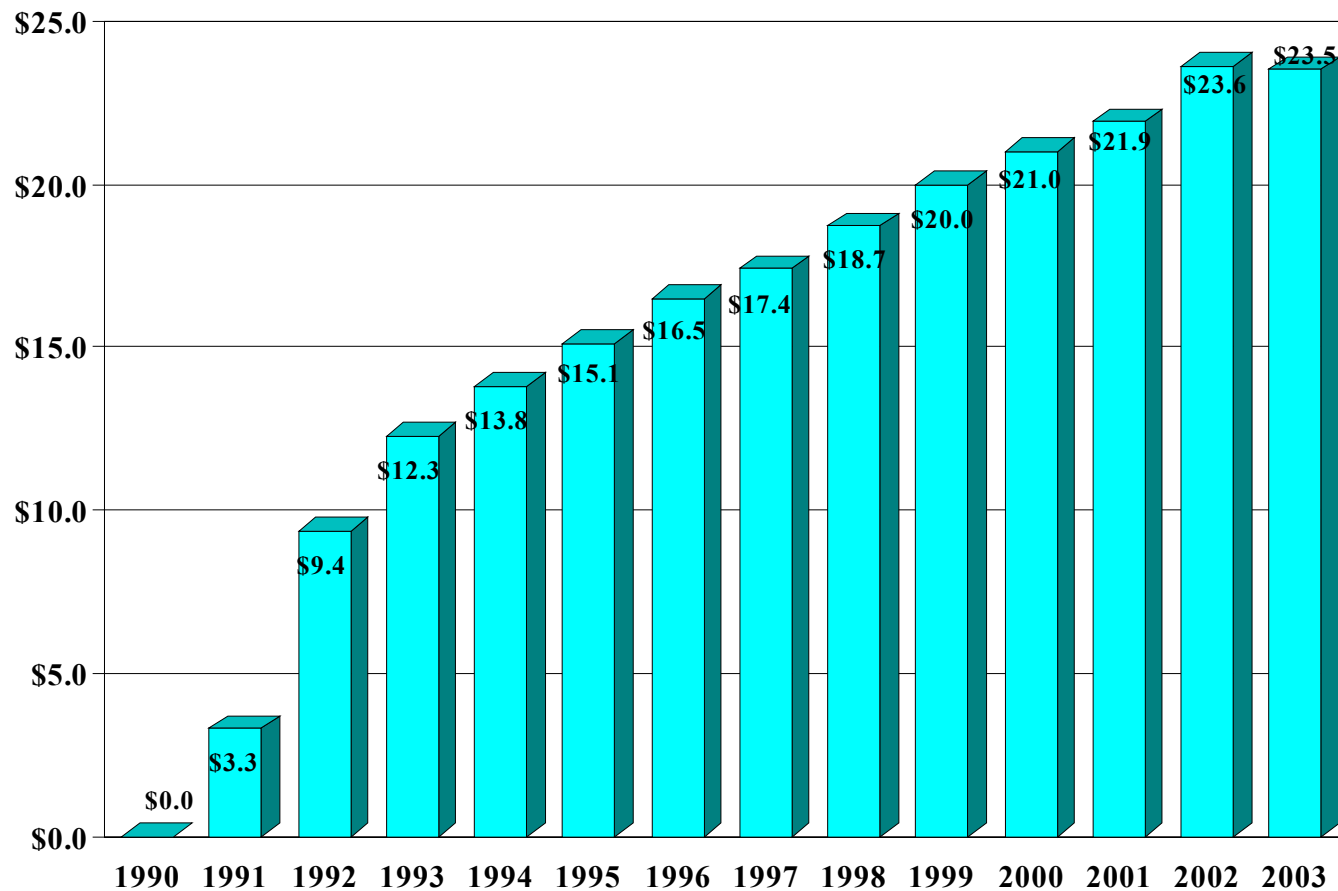
2003 Restaurant Tax Revenues – Top 10 Counties





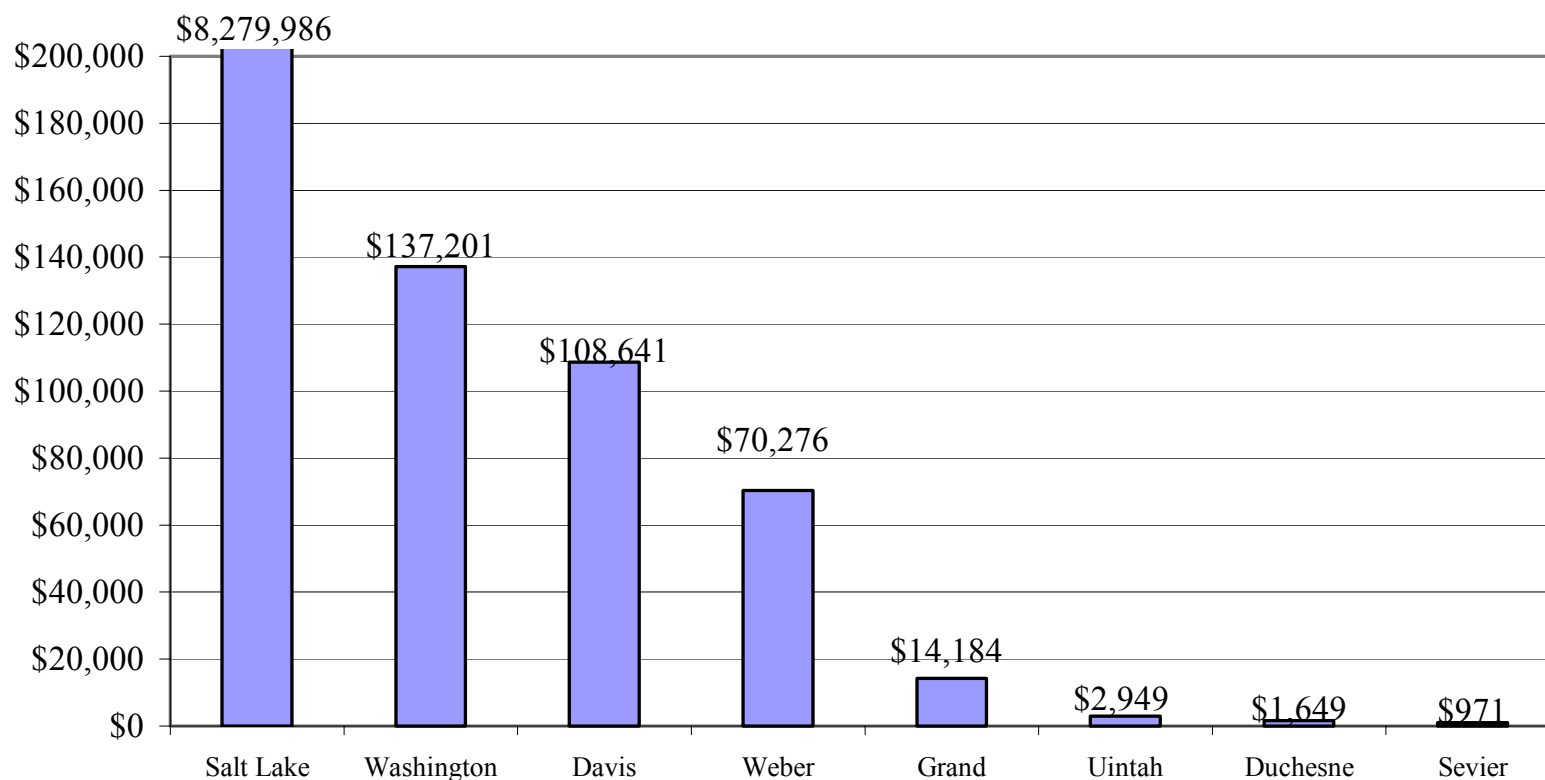
Gross Restaurant Tax Collections in Utah

Millions



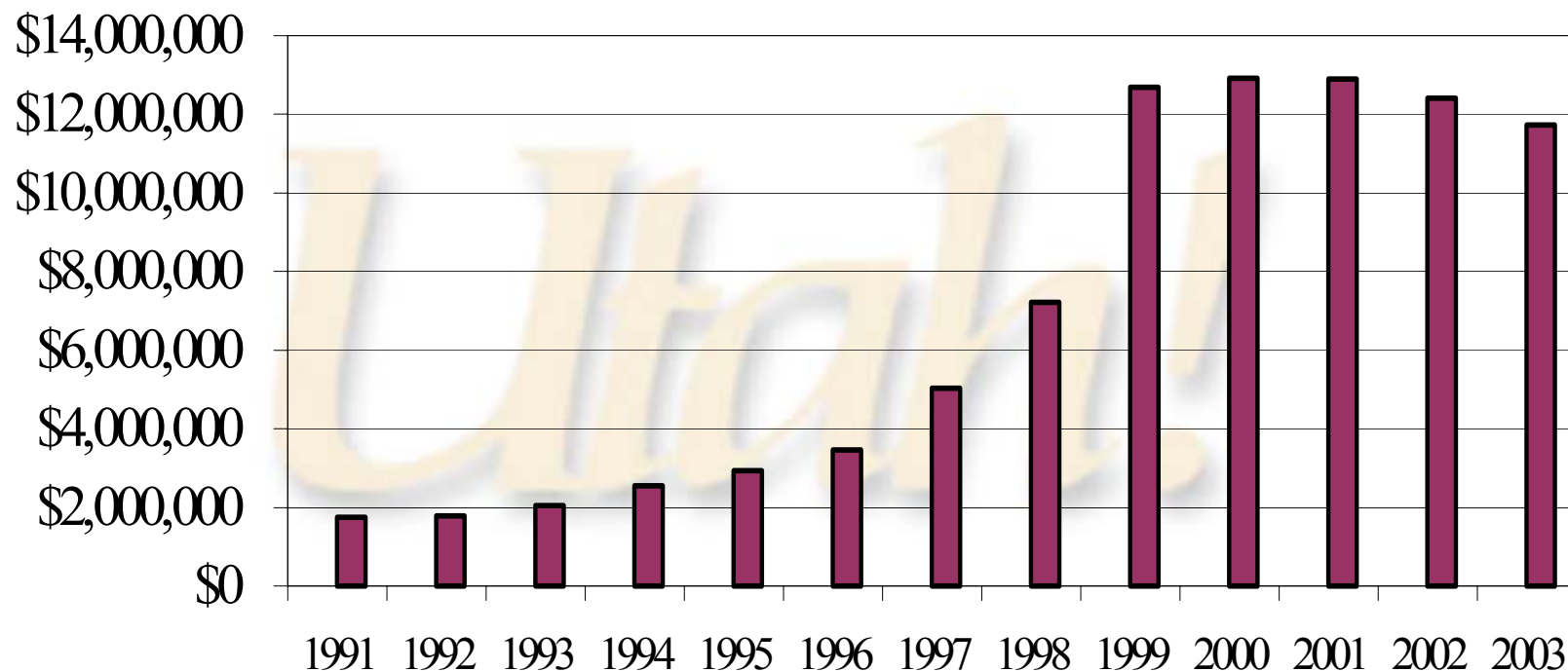


2003 Car Rental Tax Revenues



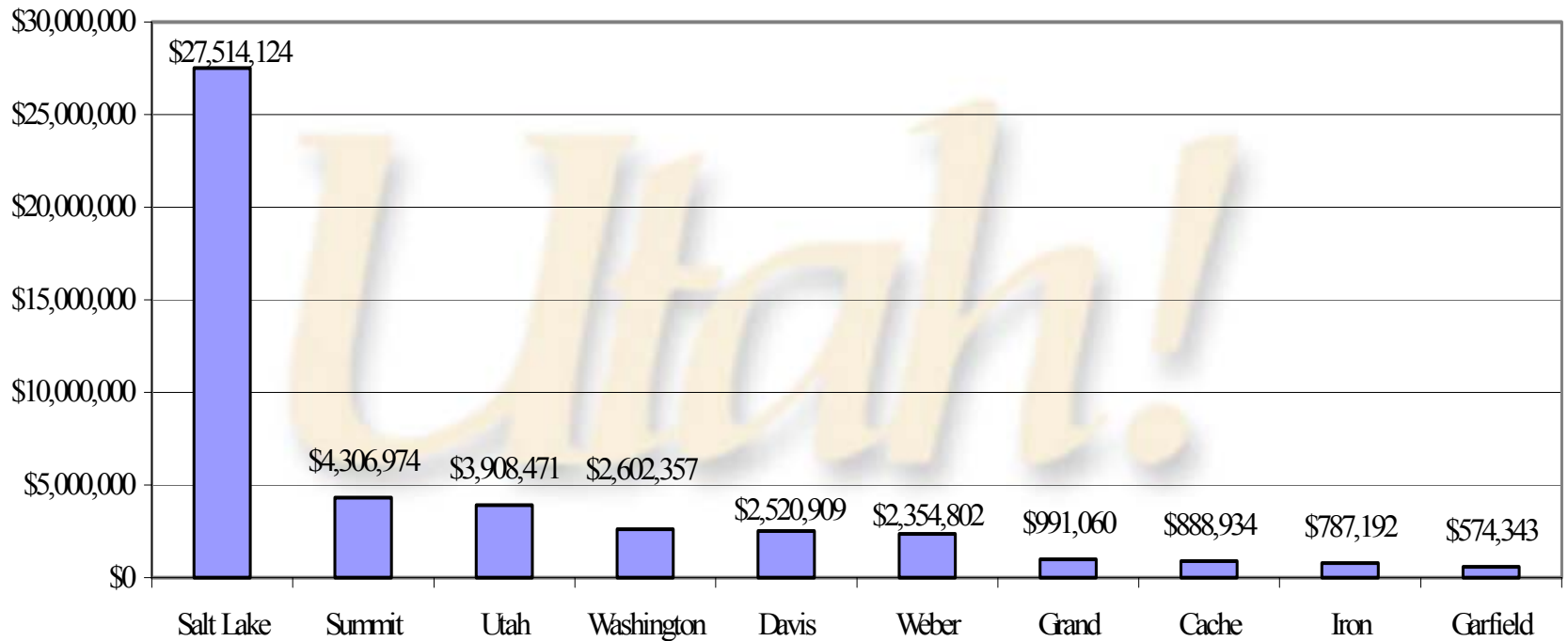


Car Rental Tax Collections in Utah



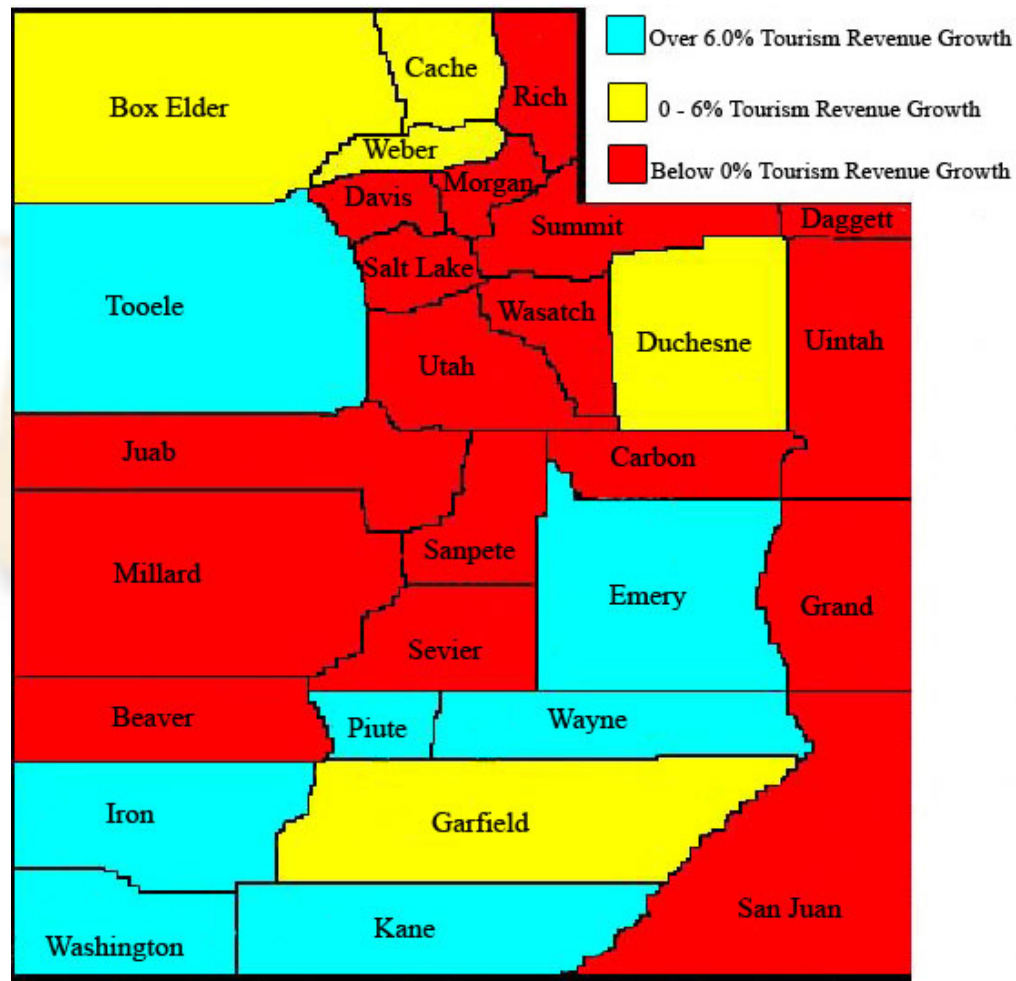


2003 Total Tourism Tax Revenues – Top 10 Counties



Source: Utah State Tax Commission

Tourism-Related Tax Revenues – % Change 2002-2003



Source: Utah State Tax Commission



Primary Tourism Sectors

<u>Sector</u>	<u>% Change (Q1,03-Q1, 04)</u>
Transportation	47.2%
Eating & Drinking	7.8%
Amusement/Recreation	5.7%
Hotel/Lodging	5.5%
Auto Rental	0.7%
<hr/>	
TOTAL CHANGE	6.9%



Source: Utah State Tax Commission



Who is the Utah Overnight Leisure Visitor?

Utah Visitor Demographics – 2001

Age

18-34 35%

35-54 48%

55+ 17%

Average Age = 41.7 years old

Household Income

<\$25,000 14%

\$25K-\$49,999 32%

\$50K-\$74,999 29%

\$75,000+ 25%

Average AHH Income \$57,600

Party Composition

One Adult 15%

MM/FF 3%

3+ Adults 9%

Couples 31%

Families 43%





Who is the Utah Visitor?

Utah Visitor Origins – 2001

Top DMA's

Salt Lake City	36%
Los Angeles	9%
Las Vegas	4%
Denver	4%
Idaho Falls/Pocatello	7%
San Francisco Bay	3%
Twin Falls	2%

Top States

Utah	36%
California	17%
Idaho	8%
Nevada	7%
Colorado	7%
Texas	3%
Wyoming	2%





Who is the Utah Visitor?

Utah Non-Resident Visitor Travel Patterns – 2001

Why Utah?

Leisure	74%
Business	26%

When to Come?

Mar-May	22%
Jun-Aug	36%
Sep-Nov	19%
Dec-Feb	23%

How to Get Here?

Drive	70%
Fly	25%
Other	5%

Where to Stay?

Hotel/Motel	57%
Private Home	28%

- ▶ **Average stay of 3.2 nights**
- ▶ **Average daily expenditure per visitor per day - \$101**





Who is the Utah Visitor?

Utah 2001 Overnight Leisure Visitor Travel Activities

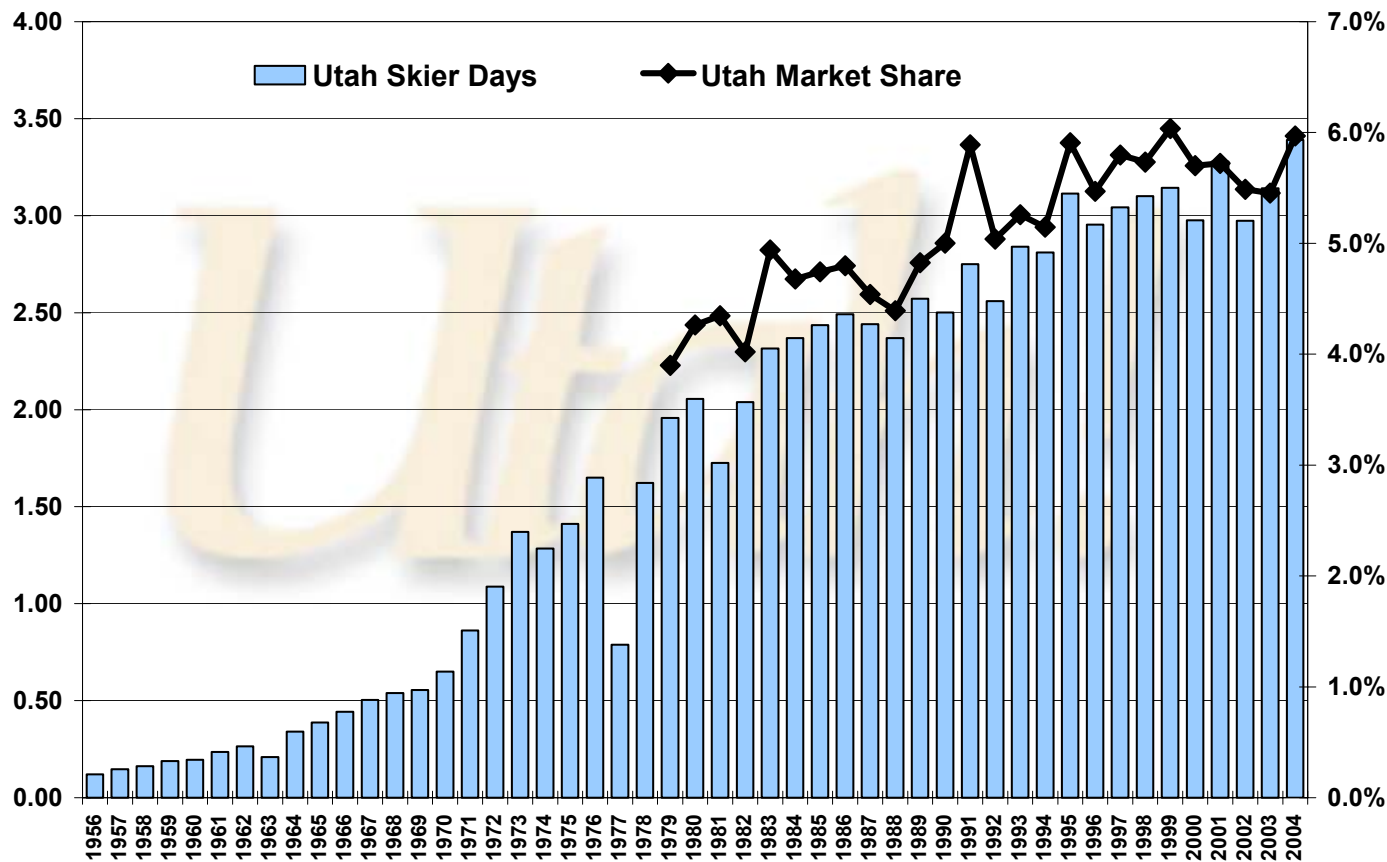
Dining	26%	Nat'l/State Parks	21%
Shopping	21%	Camping	11%
Hike/Bike	14%	Historic Site	9%
Historic Site	9%	Ski	5%





Utah Skier Days and National Market Share

Millions



Sources: United Ski Industries Association; Bureau of Economic & Business Research, University of Utah; Ski Utah; National Ski Areas Association





Total Annual Ski/Snowboard- Related Expenditures

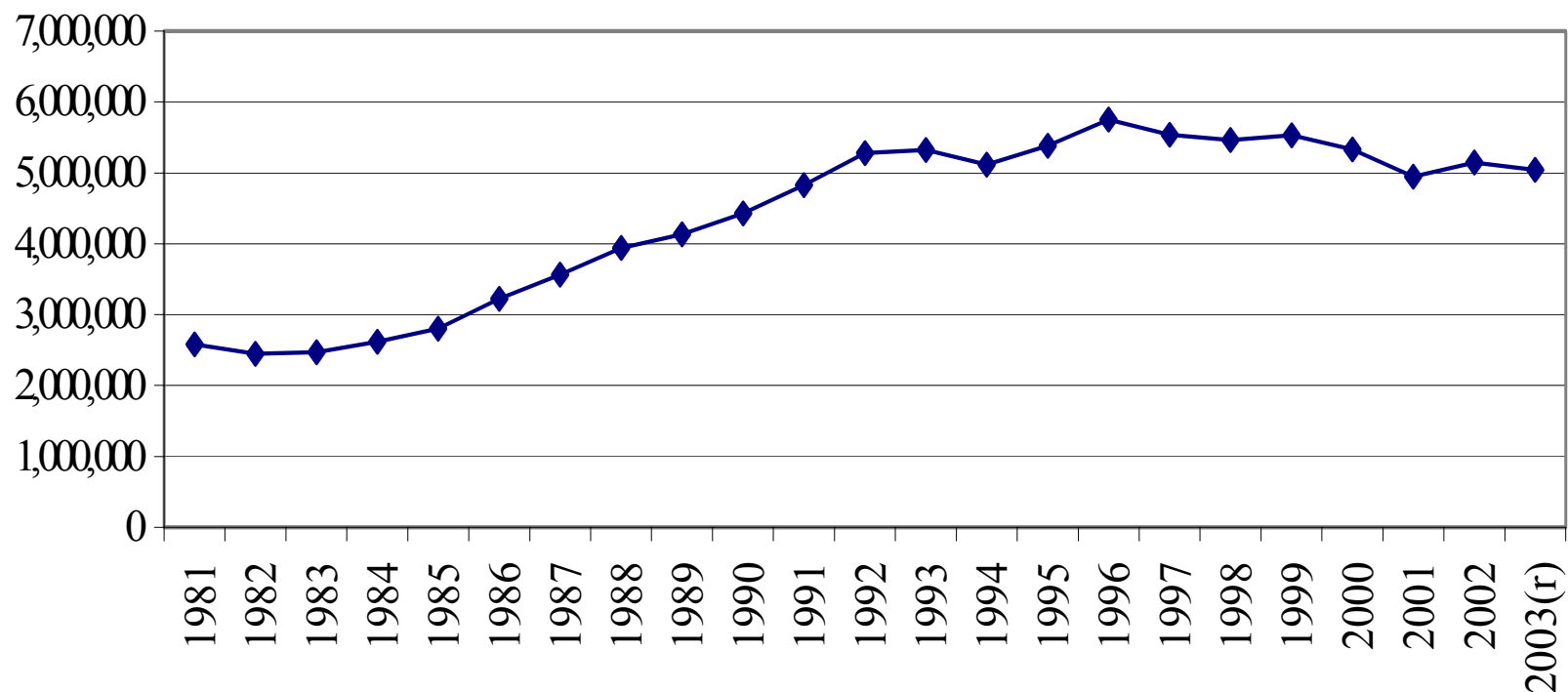
	2003/04 Aggregate Annual Expenditures	% Change 2002/03 – 2003/04
Out of state / international visitors	\$580.0 million	7.5%
Utah residents	\$177.7 million	7.8%
TOTAL	\$757.7 million	7.6%



Source: UTC estimates using data from Ski Utah Skier and
Snowboard Survey 2002/03 – RRC Associates; Ski Utah; National
Ski Areas Association



Utah National Park Visitation 1981-2003



Source: National Park Service





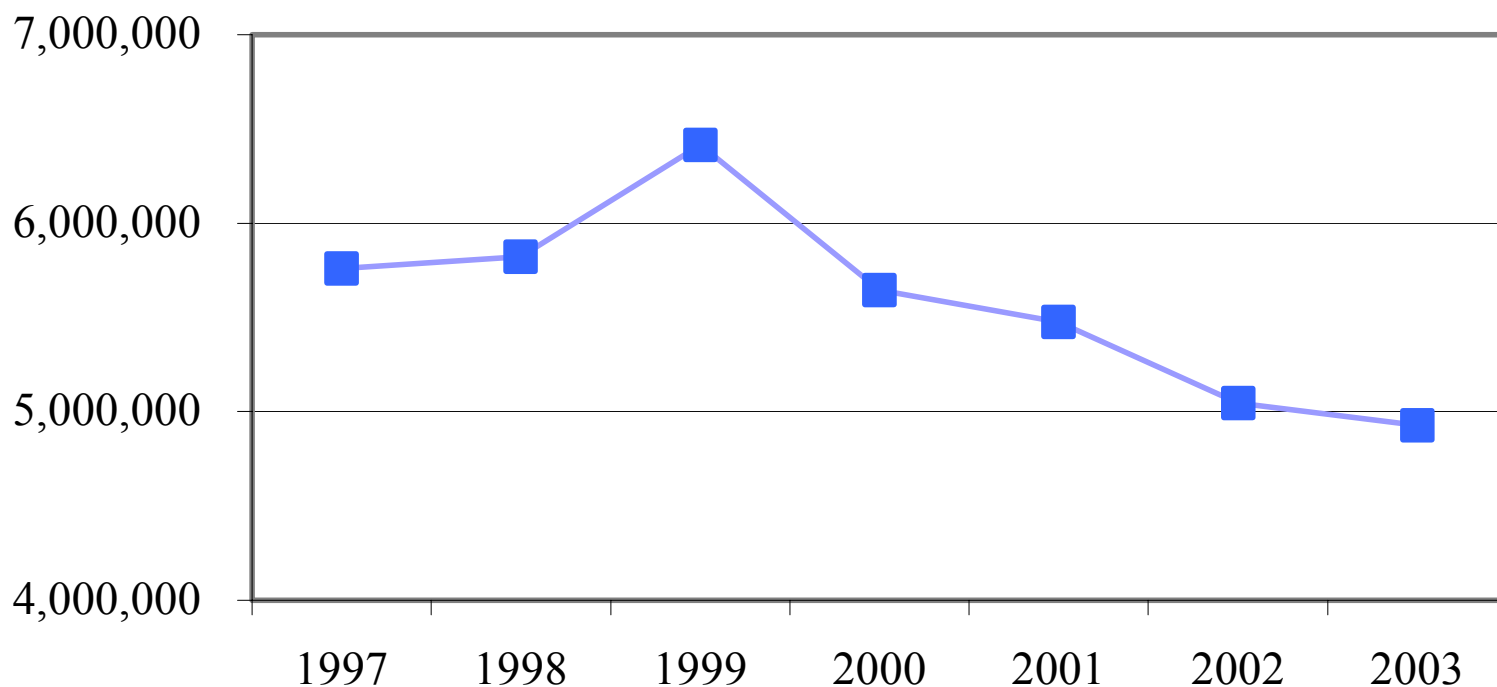
Utah National Park Visitation 2004 (through August)

<u>Park</u>	<u>% Change 2003-2004</u>
Arches	-1.0%
Bryce Canyon	+13.7%
Canyonlands	-2.0%
Capitol Reef	-6.7%
<u>Zion</u>	<u>+10.3%</u>
TOTAL CHANGE	+7.8%





Utah National Monument & Recreation Areas Visitation 1997-2003



Source: National Park Service





Utah National Monument & Recreation Areas 2004 (through August)

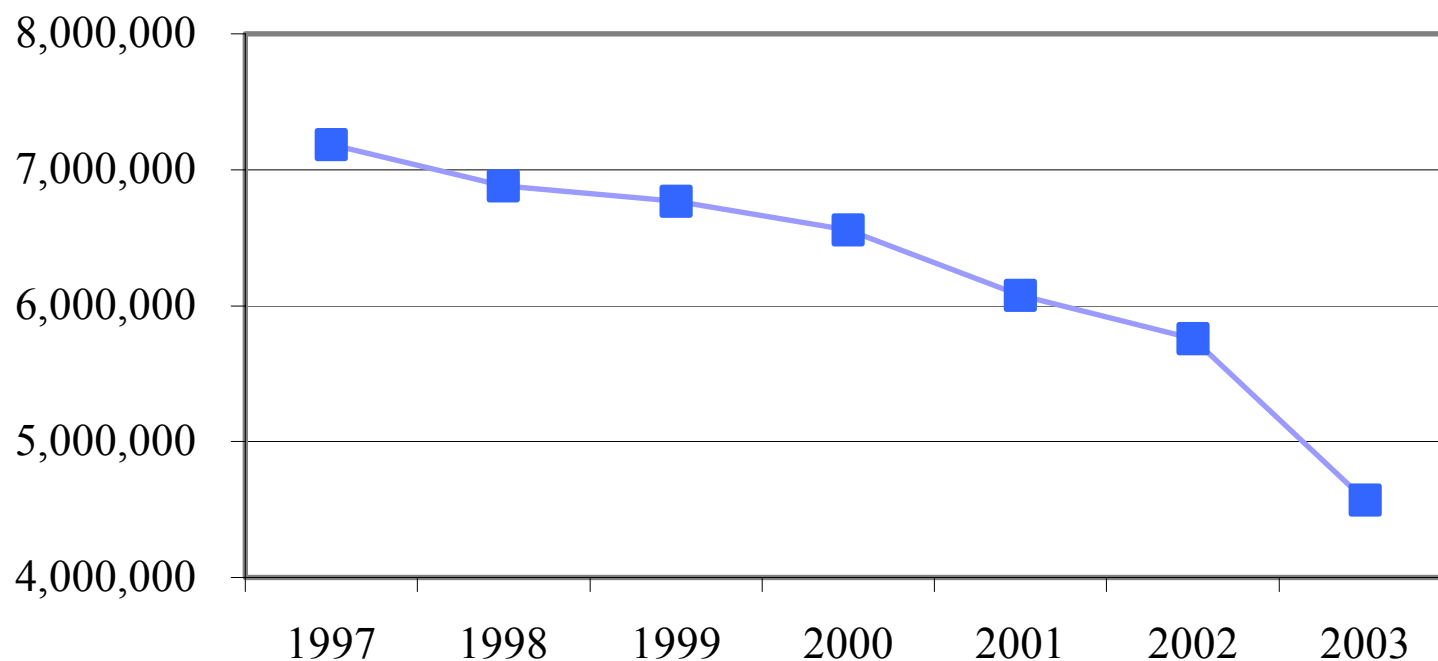
<u>Location</u>	<u>% Change 2003-2004</u>
Cedar Breaks N.M.	-11.1%
Dinosaur N.M.	+22.1%
Glen Canyon N.R.A.	-1.6%
Golden Spike N.H.S.	+1.4%
Hovenweep N.M.	+6.9%
Natural Bridges N.M.	-2.3%
Rainbow Bridge N.M.	-25.4%
<u>Timpanogos N.M.</u>	<u>+4.6%</u>
TOTAL CHANGE	-1.1%

Source: National Park Service





Utah State Park Visitation 1997-2003



Source: State Parks & Recreation





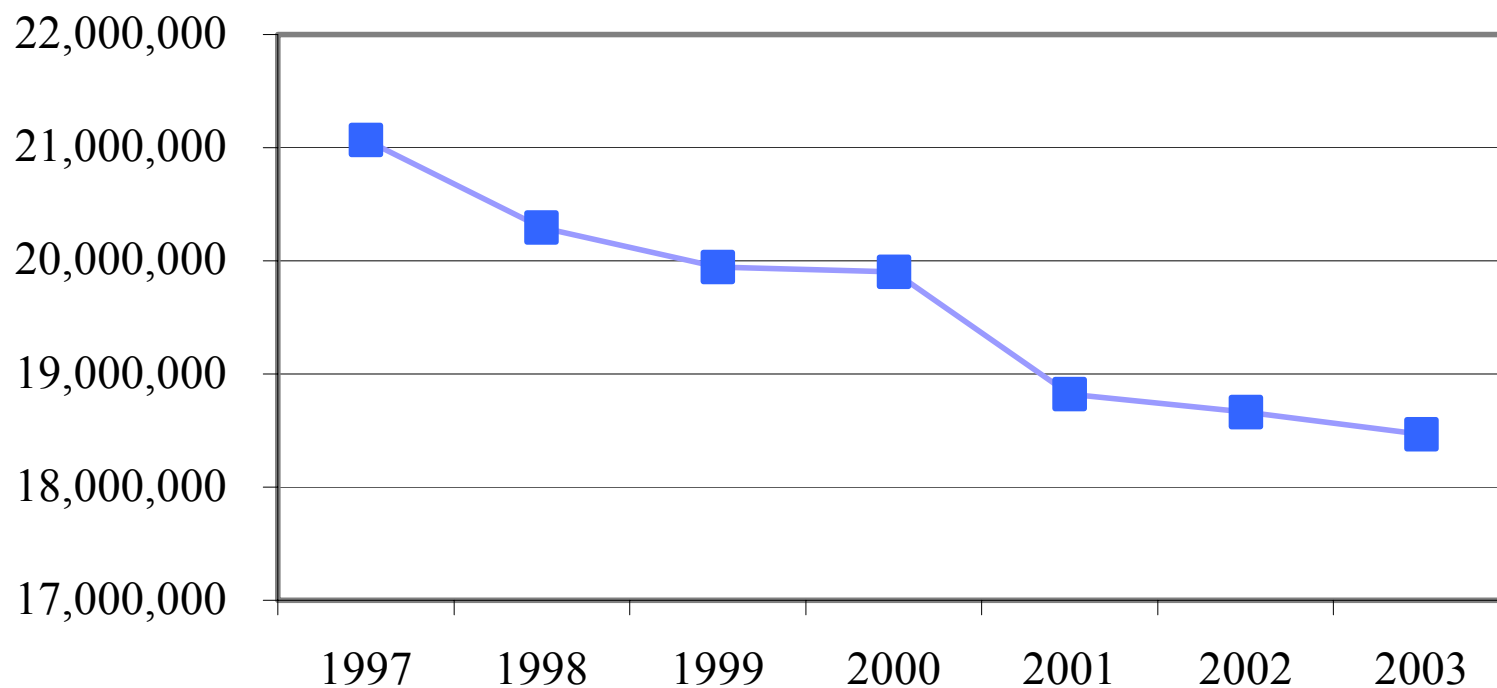
Utah State Park Visitation 2004 (through August)

<u>Location</u>	<u>% Change 2003-2004</u>
Sand Hollow	+114.8%
Utah Lake	+87.7%
Jordanelle	+59.6%
Utah Field House of Natural History	+58.3%
Quail Creek	-67.6%
Green River	-56.3%
Willard Bay	-50.0%
<u>Goosenecks</u>	<u>-31.0%</u>
TOTAL CHANGE (all Parks)	-5.7%





Salt Lake International Airport Passengers 1997-2003



Source: Salt Lake International Airport





Salt Lake International Airport Passengers (through August 2004)

Passengers

10,667,234

% Change
2003-2004

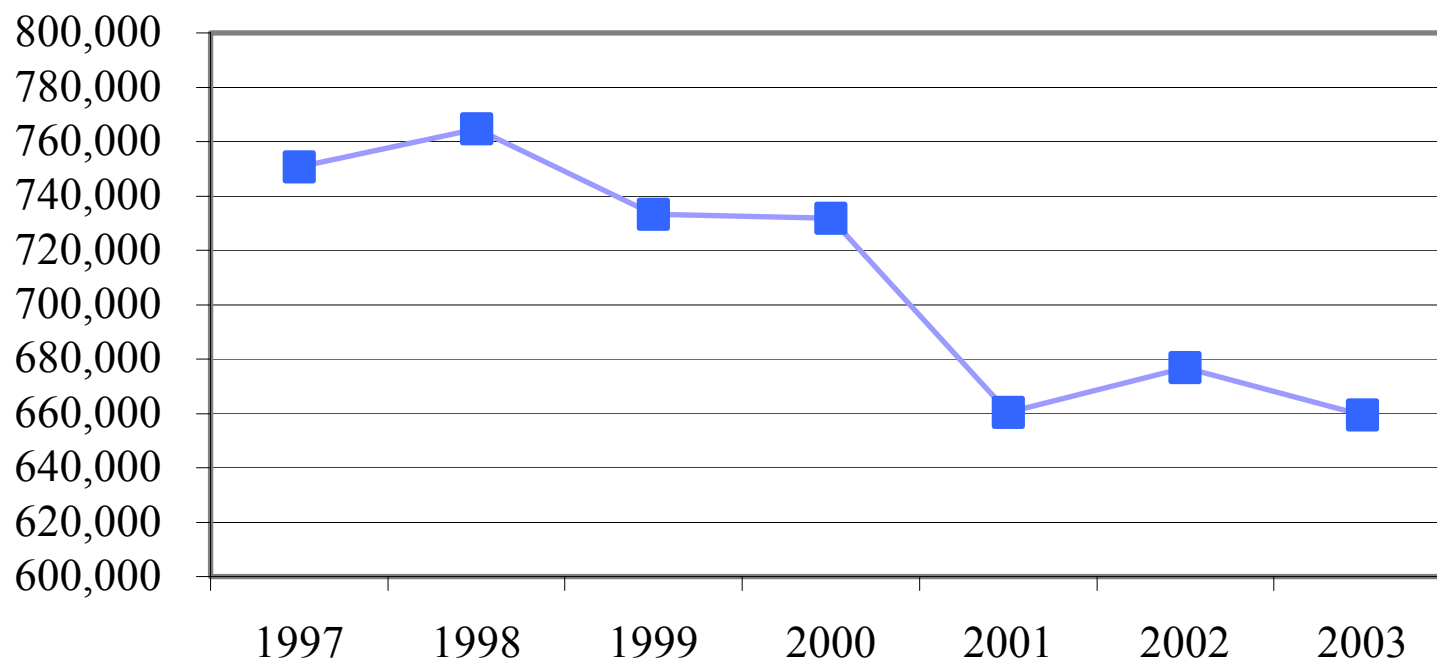
-2.1%





Utah Travel Council

Welcome Center Visitation 1997-2003



Source: Utah Travel Council





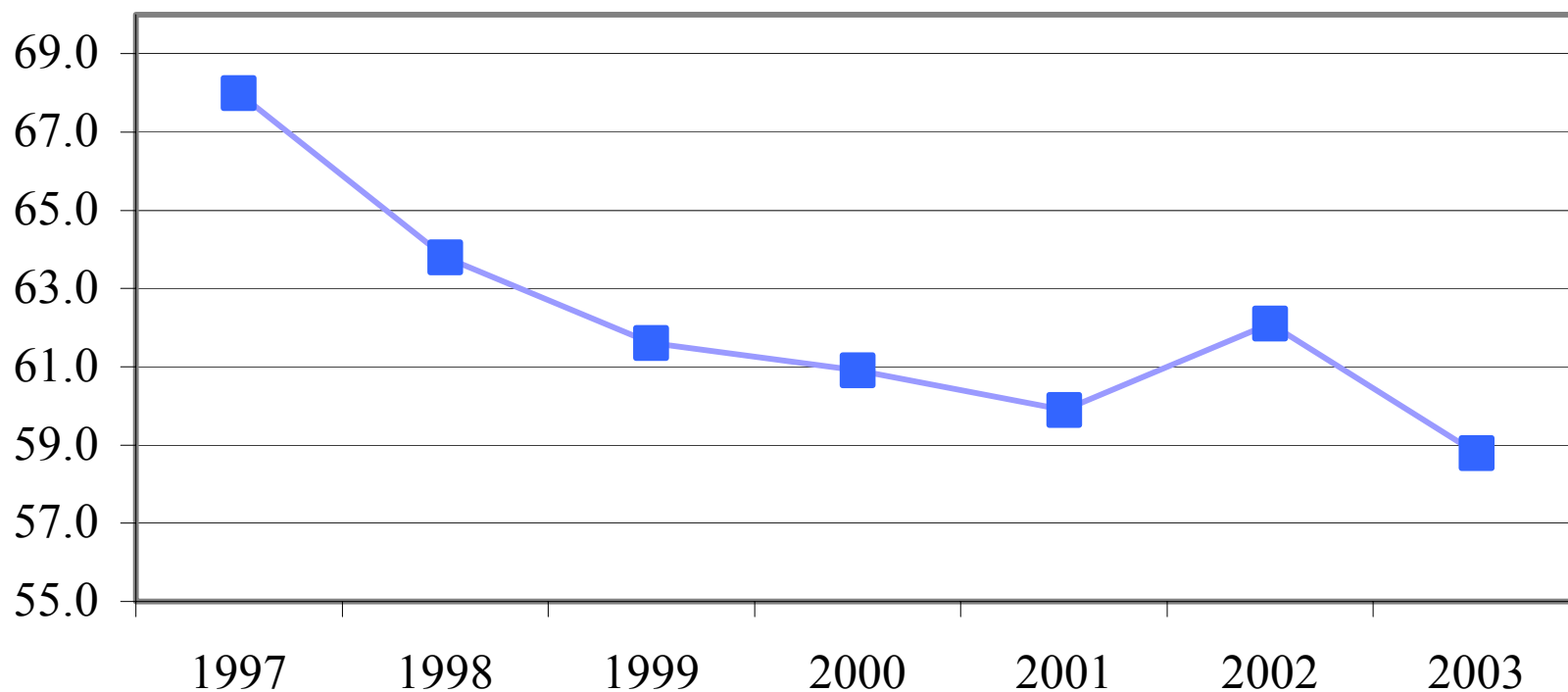
Utah Travel Council Welcome Center Visitation 2004 (through August)

<u>Location</u>	<u>% Change 2003-2004</u>
Council Hall	-12.3%
St. George (I-15 AZ)	+27.5%
Brigham City (I-15 ID)	-26.0%
Echo (I-80 WY)	-8.0%
Thompson Springs (I-70 CO)	-2.7%
<u>Jensen (U.S. 40 CO)</u>	<u>+30.4%</u>
TOTAL CHANGE	-6.2%





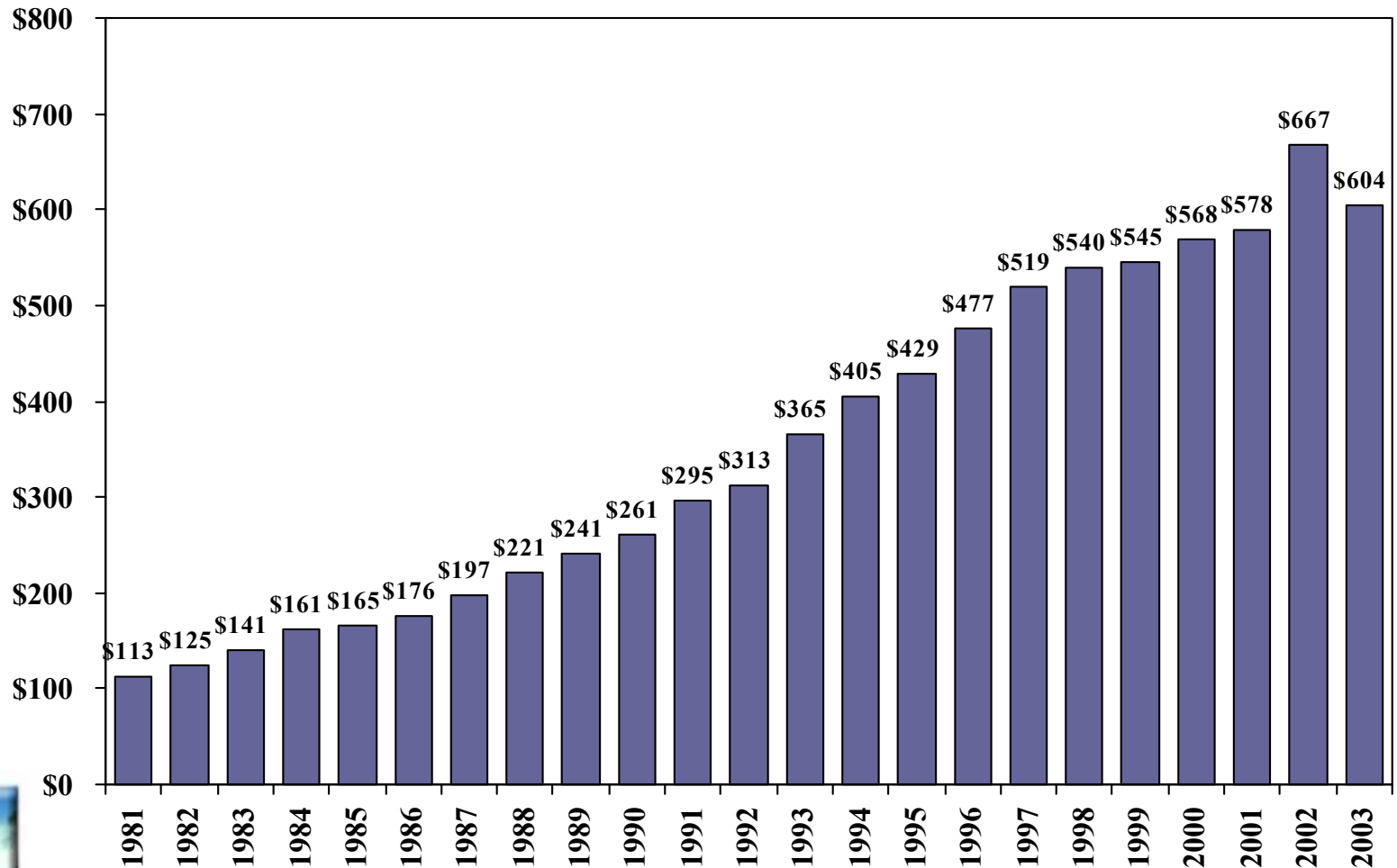
Total Utah Occupancy Rate 1997-2003





Hotel Room Rents 1981-2003

(million of current dollars)



Source: Utah State Tax Commission



Utah Occupancy Rates (Through August 2004)

<u>Location</u>	<u>Occupancy Rate</u>	<u>% Change 2003-2004</u>
Salt Lake City	64.5%	2.5%
Ogden	64.1%	-4.3%
Cedar City	61.5%	7.1%
St. George	67.6%	0.6%
Logan	60.9%	2.1%
Utah County	64.8%	5.8%
Park City	54.6%	-0.3%
Other	54.6%	-0.4%
TOTAL UTAH	63.2	2.0%





Where Utah Travelers Go

Destination	2003 Visitation
L.D.S. Temple Square	Over 5.0 Million
National Parks	5.0 Million
National Monuments & Recreation Areas	4.9 Million
Skier Visits	3.4 Million
Lagoon Amusement Park	1.1 Million
L.D.S. Family History Research Centers	794,000
Utah's Hogle Zoo	718,000
Thanksgiving Point	500,000
Clark Planetarium	351,000
This Is The Place Heritage Park	300,000



Sources: Utah Travel Council, Ski Utah, NPS, U.S. Forest Service, BLM, SLCVB, Utah Department of Parks and Recreation, The Church of Jesus Christ of Latter-Day Saints, Lagoon Amusement Park, This Is The Place Heritage Park, Thanksgiving Point



Trends

- **The Appeal of Spa-Going**
- **Finding the Best Price**
- **Booking Online**
- **Media Habits of Leisure Travelers**

Utah!



Source: Yesawich, Pepperdine, Brown &
Russell/Yankelovich Partners – Market
Intelligence eNewsletters 2004



The Appeal of Spa-Going

Very/Extremely Important in a Vacation Experience	% Agree
Getting exercise	45
Going to theme parks	43
Snorkeling and scuba diving	39
Participation in water sports	33
Going to a spa	34
Learning a new skill or activity	30
Being able to gamble	25
Snow skiing	17
Playing golf	16
Playing tennis	6



Source: Yesawich, Pepperdine, Brown &
Russell/Yankelovich Partners – 2004 National
Travel Monitor



The Appeal of Spa-Going

- **41% of females more interested in spa-going than males**
- **25% of males also interested in spa-going while on vacation**



Source: Yesawich, Pepperdine, Brown & Russell/Yankelovich Partners – 2004 National Travel Monitor



The Appeal of Spa-Going

- **75% of American adults are seeking ways to reduce stress**
- **40% say they don't have enough time**
- **52% of Americans with household incomes over \$150,000/year have visited an amenity spa at a luxury hotel or resort during the past two years**
 - **12% have also visited a destination spa**





Finding the Best Price

- **67% of adults are now “very/extremely concerned about making ends meet financially”**
- **81% of leisure travelers now state they would be willing to change their hotel reservation if they could find less expensive accommodations of similar quality**
- **74% of business travelers now state they always attempt to get the best prices on travel services when traveling on business**



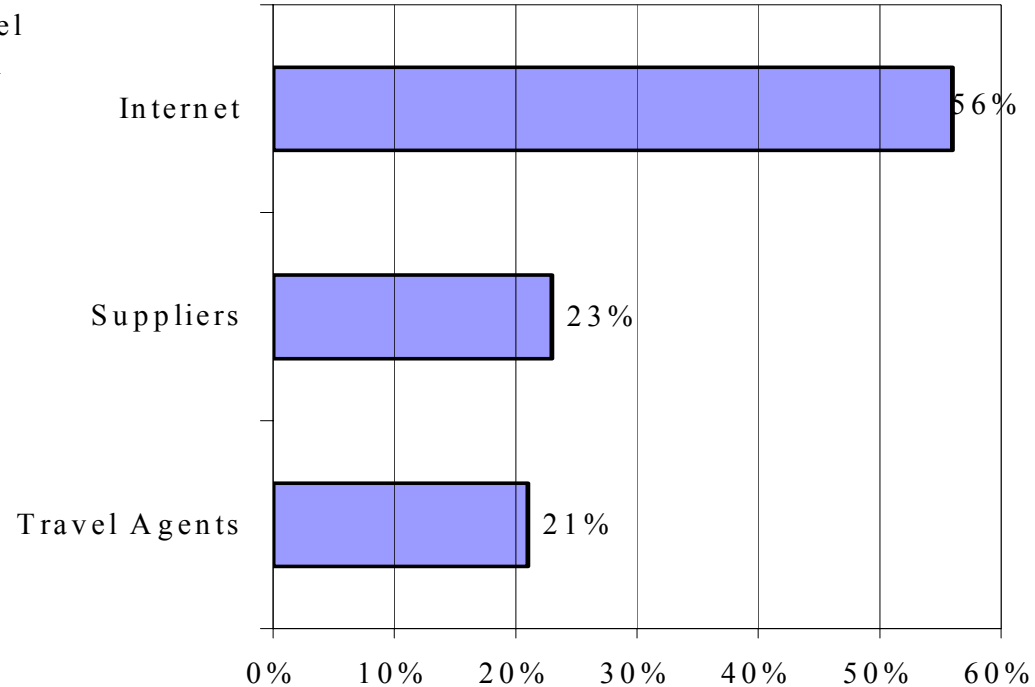


Finding the Best Price

I get the best
prices on travel
services from



Shopping Behavior (Leisure Travelers)



Source: Yesawich, Pepperdine, Brown &
Russell/Yankelovich Partners – 2004 National
Travel Monitor



Finding the Best Price


- **Call Centers & Travel Agents still play a critical role**
 - **Many online shoppers still go back to “old-fashioned” methods when actually booking their reservations**
- **Travel suppliers have been wise to drive people to book through their own websites**
- **Will people believe they get the best prices from third-party sellers or sites hosted by dedicated suppliers?**





Booking Online

- **69% of business travelers now use the Internet to plan some aspect of a future business trip**
- **63% of leisure travelers now use the Internet to plan some aspect of a future vacation**



Source: Yesawich, Pepperdine, Brown &
Russell/Yankelovich Partners – 2004 National
Travel Monitor



Booking Online

➤ **Among active business travelers during the previous 12 months:**

- **80% went online to reserve hotel accommodations**
- **68% went online to book an airline reservation**
- **45% went online to arrange a car rental**





Booking Online

➤ **Among active leisure travelers during the previous 12 months:**

- **73% went online to reserve hotel or resort accommodations**
- **64% went online to book an airline reservation**
- **32% went online to arrange a car rental**
- **20% went online to book a complete vacation package**





Media Habits of Leisure Travelers

- **Active leisure travelers:**
 - **spend an average of 4.3 hours per day watching television during the week, and 4.6 hours per day on weekends**
 - **spend an average of 2.9 hours per day listening to the radio during the week, and 2.4 hours per day on weekends**





Media Habits of Leisure Travelers

➤ **Active leisure travelers:**

- **81% subscribe to cable television**
- **80% subscribe to magazines**
- **43% read a newspaper daily**
- **30% regularly refer to the Sunday Travel Section of their local newspapers when making vacation plans**





Media Habits of Leisure Travelers

➤ **The majority of active leisure travelers now turn to cable networks during prime time. The top five include:**



▪ **Discovery – 56%**



▪ **Weather – 49%**



▪ **A&E – 47%**



▪ **History – 47%**



▪ **Lifetime – 43%**

Source: Yesawich, Pepperdine, Brown &
Russell/Yankelovich Partners – Market
Intelligence eNewsletter February 2004





Media Habits of Leisure Travelers

- **YPB&R reaffirm that the most effective media strategy to market travel services is one that incorporates a mix of both offline and online components.**





Questions? Go to

<http://travel.utah.gov>





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The 2005 Utah! Scenic Calendar highlights 16 of Utah's 28 Scenic Byways, including the state's All-American Road - Highway 12, and four National Scenic Byways - Logan Canyon, Huntington/Eccles Canyons, Nebo Loop and Flaming Gorge.
[Details and order form](#)



High-Velocity Economic Development For Utah
Utah Tourism Industry Coalition

In 2004, the Utah Tourism Industry Coalition then held several direct discussions with the tourism community including members of the Board of Travel Development, the Department of Community and Economic Development, travel-related associations and businesses, community leaders and legislative leadership. The result was the drafting of a [Performance-Based Funding Proposal](#)



For Travel and Tourism Information visit www.utah.com

NOAA Weather Forecast
70 F

What's New In OCTOBER

- [Performance Based Funding](#)
- [Utah Fall Color Tours](#)
- [Summer 2004 Barometer - Research & Planning Newsletter](#)
- [Utah Advertising Effectiveness FY 2003](#)
- [The New 2004-05 Utah Travel Guide is published](#)
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Submit it online at:
<http://www.utah.com/events/submit.htm>

submissions via website receive priority over email or phone submissions

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Or Contact:

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fax: (801) 538-1399
E-mail: dmwilliams@utah.gov

**For more research stats and info, please visit the UTC
website: [HTTP://TRAVEL.UTAH.GOV](http://TRAVEL.UTAH.GOV)**



Enjoy

Utah!

Thank you!

